

Welcome to Integrating HotDocs in Statewide Websites

◆ Session Goals:

- Introduce to the types of questions/issues that need to be addressed when posting templates to PUBLIC statewide websites.
- See how some states are addressing those questions/issues.
- Discuss the other questions in how to co-manage HotDocs and statewide websites including advocate and public templates/sites.

Activity:

- ◆ Get into groups at one of the available laptops.
 - (For those of you actively developing HotDocs try to spread yourselves out.)
 - Nominate a “navigator” – to guide your group through the Internet
 - Nominate at least one “reporter” – to report on your experiences with the rest of the group.

Race to find HotDocs

- ◆ You have 15 minutes to find as many live HotDocs links on statewide websites.
 - You must find HotDocs links on at least 1 site that is not managed by someone in your group.
 - As your looking think about the experience of a pro se or low literacy person – (will be discussing this so your reporter may want to take some notes.)

No idea where to begin...

◆ The following states have live links to HotDocs forms on their public statewide website:

- California
- Illinois
- Indiana
- Maine
- Michigan

Still having a hard time....

- ◆ After moving to Venice Beach you have a totally new spiritual experience and decide to change your name.
- ◆ In Maine you'll be able to figure out if you can get help buying groceries with this nifty tool.
- ◆ There's a Springfield in every state- but in this state you can find out how to appoint short term guardian for your child.
- ◆ While living in Gary, your ex- "Gary" won the lotto and now you want more money for the kids.

What did you find?

- ◆ http://www.illinoislegalaid.org/index.cfm?fuseaction=home.dsp_content&contentid=4639
- ◆ http://www.indianajustice.org/Home/PublicWeb/Library/Index/2020000/2020010/index_html#2020010
- ◆ <http://www.ptla.org/estimator.htm>
- ◆ <http://www.lawhelp.org/>
- ◆ <http://www.michiganlegalaid.org>

Let's talk about the experience

- ◆ Was it easy?
- ◆ How did people go about looking (as an advocate would or a pro se)?
- ◆ How many of you relied on someone in the group who is developing HotDocs?
- ◆ What was most frustrating?
- ◆ Most impressive/surprising?

What are the implications for professional users?

- ◆ Should it be "easy" to find the forms
 - In what situations?
- ◆ Should the forms be within relevant content?
 - In what situations?
- ◆ Should users be able to access a general list of available forms (out of context)
 - In what situations?

Exploring how others are answering these questions...

◆ The Illinois Public Website Example:

- www.illinoislegalaidonline.org
- Content rich site – with a heavy focus on search.
- Special thanks to Lisa Colpoys, Executive Director of Illinois Legal Aid Online for answering the following questions.

Where on the site?

- ◆ Only from within content (self-help materials/library – we do not differentiate between the two). We do not want people going to a forms section/list and selecting forms that may not be right for them, so we only link to hot docs templates from within a piece on information that instructs them on how to deal with the legal problem that the forms are for.

Process before you post the forms:

- ◆ The forms are tested by our staff or law student interns before going live. Selected forms have been developed for specific self-help centers and access is limited to visitors to those centers initially, until any bugs that are discovered by users of the self-help center are fixed. Then they are made live for any website user.

Introductory Material the User Receives before linking to the form

◆ This varies depending on what information they get to the form from. 2 examples follow:

1. Text content:

http://www.illinoislegalaid.org/index.cfm?fuseaction=home.dsp_content&contentid=44

(scroll to bottom for link to form)

2. Guide Me Module:

http://www.illinoislegalaid.org/index.cfm?fuseaction=home.dsp_content&contentid=4639

(click on Forms/Letters tab to get to forms)

Are you providing any end-user support?

- ◆ We provide training to self-help center staff/volunteers on how to use the website and the hot docs forms so they can assist people who get stuck. We created a “Rules and Tips for Using the Public Access Computer” for a new self- help center we helped to open in federal court – there is no one to assist those who use the public access computer.
- ◆ That document is available in the online materials for this session and in hard copy (at the front of the room).

Other things you've learned

- ◆ People need to understand the time commitment necessary to develop HD templates – it is very time and labor intensive.
- ◆ Also, our state does not have uniform forms, so we started with forms that could be used anywhere in the state, or were not court forms (i.e., powers of attorney for health care).

More on the “uniform forms issue”

- ◆ It will be a big problem for us as we begin to develop pleadings – we are currently trying to get legal aid programs **to agree** on one pro se divorce pleading – not an easy task – at first everyone wanted to use their own words, but eventually they realized that efficiency should win out over specific language, as long as the effect is the same.

A few key lessons from Illinois:

- ◆ Close partnerships with court self-help centers help to test templates, provide support to template users and to gather feedback and necessary changes.
- ◆ Forms are found only within content to help ensure people use the correct form.
- ◆ Started out with non-court forms that were universal in the state (due to the fact that there are not universal forms).
- ◆ Are working on creating agreement BEFORE developing pleadings for legal aid advocates.

The Indiana Experience

- ◆ “Sticking your toes into the ocean...”
- ◆ Like Illinois links to forms are found within relevant content.
- ◆ Information is provided to the user before they link to the form –

- See:

http://www.indianajustice.org/Home/PublicWeb/Library/Index/2020000/2020010/index_html#2020010

What was the decision process:

- ◆ Balancing the needs of the pro se community with the judicial and legal attitudes.
- ◆ “Testing forms” in a limited way before broadcasting their availability.
- ◆ Waiting for feedback to determine changes or problems with the forms.

Other considerations:



Key lessons from Indiana

- ◆ Went for it – put the forms out there for the public even when unsure of response.
- ◆ Carefully considered the information around the form – what someone needed to know before completing the form.
- ◆ Using feedback to determine course of action for more forms.

There is “another side”

◆ What about people that know what form they need and want easy access?

- How “dangerous” is a list of forms.
- Example: Michigan –

http://michiganlegalaid.org/library_client/resource.2006-01-19.3783322295/html_view

Considerations

- ◆ History of forms available for pro se users in your state.
- ◆ Status of uniform forms or “court approved forms”
- ◆ Judicial and legal attitudes towards pro se.
- ◆ The way you will promote the forms.
- ◆ Whether the forms have been tested by users.
- ◆ Support you will provide to users.

HotDocs and Statewide Website Management

- ◆ Can one person “do it all”
- ◆ What are the different roles and tasks?
 - HotDocs developer
 - State project manager – ie approving developers, testing forms, coordinating with statewide website
- ◆ What should we think about when developing staff for a HotDocs project?
- ◆ How do we balance development on the pro se templates vs. advocate templates?
- ◆ How are other states developing HotDocs and working with the statewide website?